Keeping Virtual Teams Real: Successfully Managing Off-site Staff

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For managers of staff who work off-site, good communication is the key to establishing more than a remote connection. Gone are casual practices such as "management by walking around."

HIM departments understand firsthand the need to tap into talent across geographic boundaries, and many already benefit from advances in networking and collaborative technology. Over the past decade, working remotely from home, client sites, regional offices, and on the road have become common work arrangements.

Those advances are reconfiguring HIM departments, creating teams comprised of staff who work on- and off-site. In other departments, staff may be entirely remote. Managers must adapt in order to effectively lead cohesive, high-performing teams in the new virtual workplace.

That's not always easy. The physical separation of manager and staff challenges many traditional management techniques. Gone are practices such as "management by walking around."

Virtual offices change how people communicate and work with each other, transfer information, establish authority and rules, and perform and measure performance. Although emerging collaboration, networking, and remote-access technologies provide the IT infrastructure for a virtual workplace, changes in organizational culture and behavior are the key to its ultimate success.

Are You There?: Managing by Results, Not Scrutiny

It can be deceptive to gauge productivity by appearance. In traditional offices, smart managers know that is an easy error to make-assuming that one staffer is hard at work because he is at his desk while assuming that another is goofing off because she isn't.

Managers of virtual teams make the same error if they assume that off-site staff are not at work when they don't pick up the phone or reply immediately to e-mail. That's why managing by results (or objectives) is fundamental with virtual teams.

Managing by results begins with communicating clear goals, setting deadlines and sticking to them, and measuring accomplishments against those expectations.

Real Communication for Virtual Staff

Successful remote workers are disciplined and self-motivated; however, they do not want to be ignored. Poor communication is one of the most common complaints of virtual employees, and it often is caused by a lack of interaction with the manager or other team members.

Virtual staff need contact with their coworkers and managers to maximize productivity, quality, and a sense of community. Managers must find the right mix of technology and communication to provide remote staff with the connection they need.

Organizations that rely on virtual workers have four main areas of management concern: building trust; establishing commitment; ensuring self-efficacy; and managing communication among the virtual work force. Strong communication is at

the heart of each issue.

Trust is the key to any relationship, but it's particularly important for managers and staff who don't see each other daily. Just as in an office, if an employee doesn't immediately answer the phone doesn't mean that the person is goofing around. Remote staff are entitled to a lunch hour, breaks, and trips to the restroom, just as office-based staff are. Being within sight does not guarantee staff are being productive. Managers need only recall the many distractions in a traditional office—surfing the Web, e-mailing friends, and visiting colleagues at their cubicles.

Managers must remember that employees were hired to perform specific jobs and that the results are more important than the settings. Managing staff by results is critical in a virtual setting, and managers should focus on what's accomplished.

Clear Expectations, Consistent Communication

All staff, whether on- or off-site, rely on clearly defined goals to direct and measure their work. For staff working off-site, communicating those expectations fully is especially crucial. A great amount of information is communicated informally in office settings—through hallway conversations and chats at a cubicle.

Remote staff deserve that same access, and providing them with full and current information requires a more organized effort. Managers should document project expectations, changes, and updates in writing and distribute them via e-mail or fax.

Most coding professionals now working remotely, for example, once worked on-site at a hospital. There, deciphering clinical documentation and coding puzzles was made easier by walking to the next cubicle and consulting with a colleague. Now, coding in more isolated surroundings requires creative solutions to maintain coding quality, monitor productivity, and staff appropriately.

Collaborative technologies that allow for document sharing and shared project tracking help keep everyone in the loop. Good use of teleconferences, e-mail, and instant messaging can boost connectivity with coworkers and managers. Webinars and interactive online software enable staff to see the same presentation whether on-site or off.

As helpful as these technologies are, managers must be highly organized and adept at communicating both in writing and over the phone. Managers once familiar with keeping the lines of communication open by stopping by offices throughout the day are seeking new ways to replicate that interaction virtually.

Regularly scheduled conference calls are essential. They help managers understand if the expected results are on target and, if not, whether adjustments or further discussions are needed. New staff in particular benefit from regularly scheduled check-ins to discuss their work and progress. Consistent communication also lets the new hire know that the manager is accessible.

Regular contact is also important to maintain staff morale. In a traditional office setting, it is easy to compliment someone by stopping at his or her office to say "good job." For off-site employees, acknowledgment can require more effort. Sending a simple e-mail or picking up the phone to say "I'm thinking of you and the high quality work you've done lately" can make a world of difference to a remote worker.

In addition to investing in adequate IT, companies must have an IT department capable of clearly communicating with virtual employees through any tech crisis. Companies should also have a plan for troubleshooting an employee's computer, quickly recovering important files, and overnight delivery of new equipment when necessary.

Choosing the Right Jobs, the Right Staff, the Right Managers

Before any day-to-day managing begins, the fundamental management challenge of virtual teams is selecting the HIM functions that can successfully move into a virtual environment.

The most suitable functions to have made the virtual jump to date are coding and transcription. From a management perspective, coding and transcription professionals work very independently, based on clearly defined expectations. Their functions are well suited for independent work while maintaining work output, quality, and delivery.

Managers must also identify the appropriate skills, experience, and necessary behavioral competencies for staff who will perform work off-site, independently, without compromising their performance level or work satisfaction. This presents a paradigm shift from traditional staff management.

In general, individuals who display a high degree of teamwork and collaboration and don't suffer from the loss of social networking, visibility, and being in the center of action prove to be the best fit for the virtual workplace.

New Skills for Managers

Virtual workplaces also require specific skills and characteristics from managers. Managers accustomed to traditional settings can become frustrated by the difficulties associated with a virtual work force, such as the inability to resolve issues face-to-face and perceived problems in maintaining accountability. Recruiting and retaining the right manager with the correct blend of skills and experience to direct and motivate a virtual team is imperative for the department's success.

As a manager, the very real barriers of not having face-to-face interactions with staff requires a high degree of organization and communication skills that are effective in either written or verbal forms.

Managers may need to change their perceptions and beliefs on how they manage, motivate, and influence to succeed in a virtual work setting. Virtual teams may require new methods for measuring individual and team performance. Without defined expectations against which to benchmark performance, unreal expectations can build, causing doubts about the remote working practice as a whole. Virtual managers also may need to expand their communication skills, because they will be challenged to keep their staff motivated as a team and to let them know long-distance that they are valued by the organization.

Managing the new workplace also requires flexibility and a sharp eye. Virtual teams commonly face unique process issues involving workflow, quality auditing and reporting, analysis, monitoring production and work output, staffing (including covering for vacation or unscheduled time away from work), and access to on-site liaisons or support staff to support the virtual manager's tasks.

For instance, a virtual coder assigned to coding inpatient records will require a way to communicate with physicians and assign query forms as well as site support to get the expected outcome of response and resolution. For these reasons managers require a sharp eye to identify potential workflow issues and create work-arounds for daily activities, and they must approach their work with adaptability and creativity.

Measuring Program Success

HIM professionals must assess the effectiveness of the program and position organizations for improved operational performance. In using this approach, managers can select a blend of short-term and long-term quantitative and qualitative measures of success.

Expected short-term quantitative measures would include productivity (e.g., if remote staff have sufficient hardware and connectivity to accomplish the required work for each assignment). From a long-term perspective, managers must provide the support necessary to ensure that high-quality technology is available to the virtual work force. From a qualitative perspective, both short- and long-term measures are validated through stable high-quality work, the goal of every HIM department, no matter where its staff work.

Managing Privacy and Security in Remote Departments

Resources in the FORE Library: HIM Body of Knowledge

An important part of managing virtual staff is managing the secure and confidential exchange of protected health information. As information becomes more fluid and technology becomes more robust, nearly every type of medical, financial, and administrative data can be accessed and shared remotely.

Recent Journal articles address considerations in managing remote technologies to reduce risk and meet compliance regulations:

- "Weighing the Pros and Cons of IM: Instant Messaging Offers Instant Conveniences, Instant Complications," September 2007
- "Safeguards for Remote Access," July–August 2007
- "Mobile Device Use, Reuse, and Disposal," June 2007
- "Connectivity, Privacy, and Liability: What Medical Professionals Must Consider," April 2007

Read these and other articles related to off-site staff, business associates, privacy, and security in the FORE Library: HIM Body of Knowledge at www.ahima.org.

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